

Request for Scheme preference change and/or Switch

(Please fill all the details in CAPITAL LETTERS & in BLACK INK only.)

For POP-SP use: POP-SP Registration No. : _____

Receipt No.: _____ Receipt Date : ___/___/___

PRAN *: _____ Name of the Subscriber *: _____

Scheme Preference change and/or switch: Tier I Tier II

(i). Name of the PFM (Select only one)*:

PFM Name (in alphabetical order)	Please tick only one
HDFC Pension Management Company Limited	<input type="checkbox"/>
ICICI Prudential Pension Funds Management Company Limited	<input type="checkbox"/>
Kotak Mahindra Pension Fund Limited	<input type="checkbox"/>
LIC Pension Fund Limited	<input type="checkbox"/>
Reliance Capital Pension Fund Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

(Selection of PFM is mandatory both in Active and Auto Choice. In case you do not indicate a choice of PFM, your application form shall be summarily rejected).

(ii). Investment Option

Active Choice Auto Choice

(iii). Asset Allocation (to be filled up only in case you have selected the 'Active Choice' investment option)

Asset Class	E (Cannot exceed 50%)	C	G	Total
% share				100%

CRA generated Acknowledgement Number (to be filled by POP-SP): _____

	For POP/POP-SP use: _____ Name & Signature	POP/POP-SP Stamp:
Subscriber's Signature/ Thumb Impression		

(Perforation) - Acknowledgement to the Subscriber

(To be filled by POP/POP-SP)

Scheme Preference change/switch: Tier I Tier II

POP-SP Registration Number: _____ PRAN: _____

Name of the Subscriber: _____ Date: ___/___/___ Time Stamp: _____

Receipt Number
(To be provided by POP/POP-SP) _____

1. POP Transaction Charges: _____ Rs. _____ 2. Service Tax (as applicable): _____ Rs. _____

3. Total Charges: _____ Rs. _____

Signature/Stamp of POP/POP-SP/Place

Instruction for filling the Form:

- All fields mark with (*) are mandatory. All Dates should be in DDMMYYYY Format.
- The Subscribers shall submit the application to POP-SP through which they have registered with CRA.
- For more details on terms and conditions of switch, please refer to the Offer Document.
- Separate forms to be submitted for Tier I and Tier II
- **Subscriber of Government sector (having Tier I account in Government sector) can submit request only for Tier II account.**

Subscriber Scheme Preference and/or switch

Active choice

1. PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
2. Allocation under Equity (E) cannot exceed 50%
3. A subscriber opting for active choice may select the available asset classes (“E”, “G”, & “C”). However, the sum of percentage allocation across all the selected asset classes must equal 100. If the sum of percentage allocations is not equal to 100%, or the asset allocation table is left blank, the application shall be rejected.

Auto choice

4. A subscriber opting for Auto Choice must also select a PFM. The application shall be rejected if the subscriber does not indicate his/her choice of PFM.
5. In case of Auto Choice, DO NOT fill up section for Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment will be made as per Auto Choice.

In case both the investment option and the asset allocation are left blank, the subscriber’s funds will be invested as per Auto Choice